



# FIA Conference 2023

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# THE FUNDAMENTALS OF AN INTEGRATED DM CAMPAIGN

INDIVIDUAL GIVING  
NUZ HAMEED MFIA

TARONGA CONSERVATION SOCIETY AUSTRALIA

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**TRACK SPONSOR**



# WHAT WE WILL UNPACK TODAY

- Understanding the donor
- Define & develop your proposition to give
- Behavioural insights
- Creating an integrated Appeal Plan
- Let's unpack the DM
- What does integration look like
- Post Campaign analysis



Better LTV

Higher ROI

Best acquisition  
channel for mid  
value donors &  
bequestors



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Direct Mail is not always about the Ask.

Its is an opportunity to connect with your most loyal community.

To check in, express genuine concern over their well being, to connect on a sincere and meaningful level.

To have meaningful conversations like this is critical times is essential to drive donor loyalty

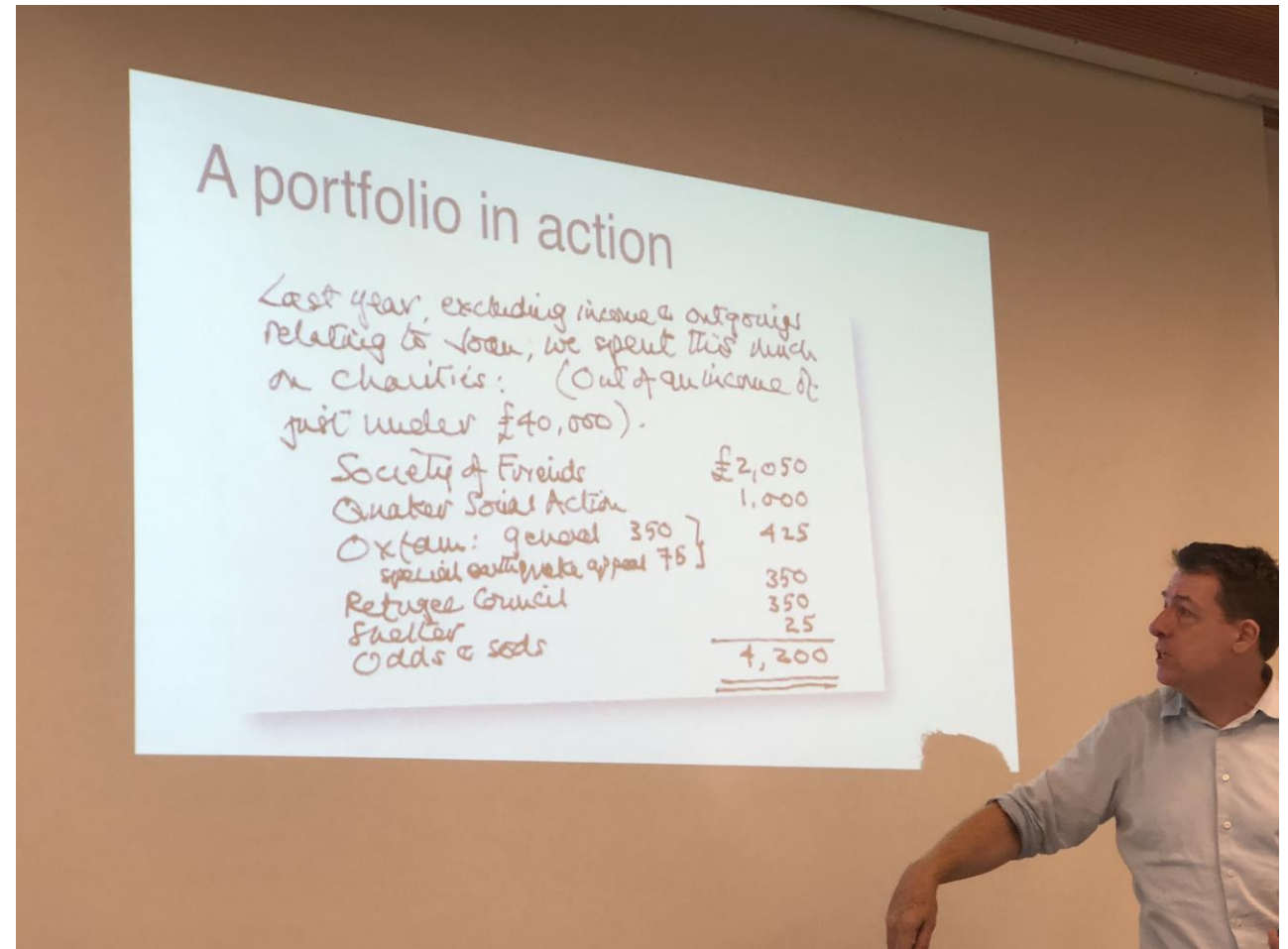
Tog



She is not  
YOUR donor.

YOU are her  
charity

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# WHO IS YOUR DOROTHY DONOR?



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**King Charles**



**Ozzy Osbourne**

- Born 1948, grew up in England.
- Married twice.
- Two children.
- Successful in business.
- Wealthy.
- Spends winter holidays in the Alps.
- Likes dogs

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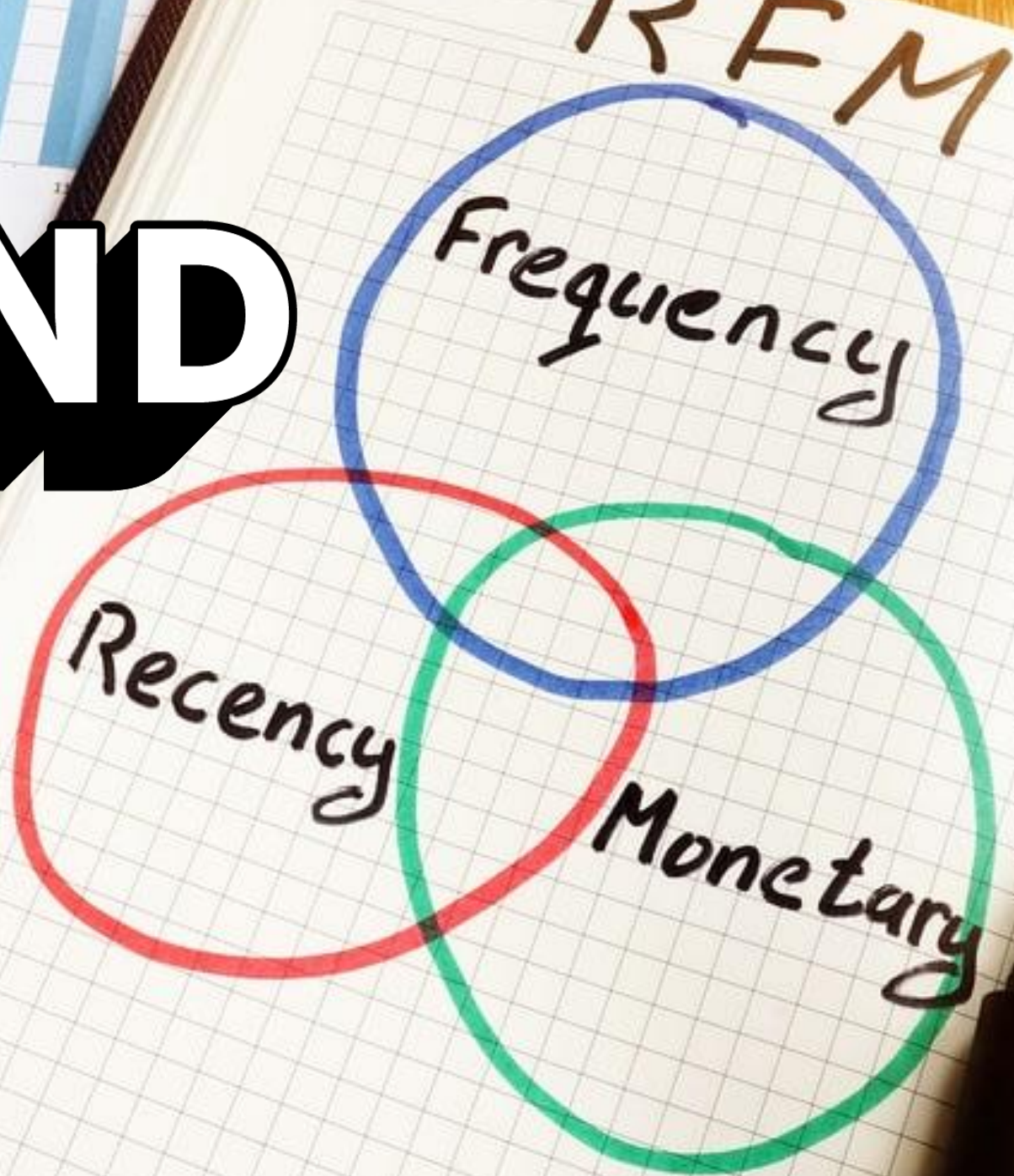
Approx. 80% of our  
donors do not  
respond to an appeal

“Your donors have identities (e.g. bird enthusiast, cancer survivor, caregiver of someone with mental health issues, member of local community, religious person who is giving in concert with their faith) that explain why they chose to give to you. You are simply choosing to ignore it.” But they won’t.

DonorVoice, May 2016



# BEYOND



## Appeal segments

High Value

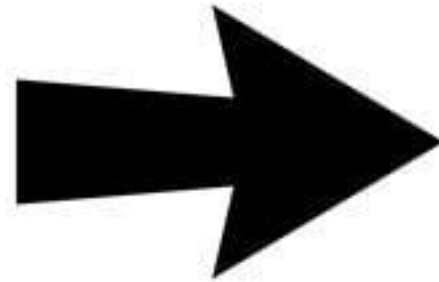
Mid Value

Active

Lapsing

Lapsed

Dormant



- Loyalty score
- Connection to cause
- Motivations to donate
- Age group
- Subjects/areas of work that resonates
- Values



## Medical

Values Research

Has personal  
connection /illness

Doing it for the  
children

## Disability

Believes in a  
world of equal  
opportunities

Sympathy for less  
fortunate

Has personal  
connection

## Homelessness

Community  
spirit/local

Religious -  
Christian duty

## International development

Has travelled to  
the country  
before - personal  
connection

Passionate about  
helping people  
living overseas

Understands the  
injustice

## HOW DO YOU GATHER THIS DATA?

Surveys

Phone conversations

Questions in response mechs

Data – evidence based (past appeals) , largest gift amounts

## HOW DO YOU DEPICT THIS?

- Letter copy that speaks to the donor's motivations to give.
- Variable copy that aligns with their area of interest/motivation to support
- For your top donors – additional lifts that speak to the specific issue
- Handwritten notes
- Tailormade content /report back/donor event



## 12 MONTHS

Develop your appeal strategy document

Appeal Content Calendar

Start sourcing/identifying the best stories

Data insights and audiences

Testing Plan

Innovation Plan

## 6 MONTHS

Ideal appeal development  
timeline

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CASE FOR SUPPORT

PACK DEVELOPMENT

TEST/LEARN/INNOVATE

Case Study

Universal heart strings tugging truth.  
Because....

Need

Urgency

Ask

Single minded proposition to give  
*Please will you give <Ask 1> today to help women like <Name> to <Solution> because ....*

Pre DM activity?

Thank You call, letter, Card, MV donor care activities .  
Event

Wave 1

Letter, lifts, RM, BRE, OE

Wave 2

Letter, lift, RM, BRE, OE

DATA & SEGMENTATION

DATA

Dollar handles

- HVD
- Top 100
- Mid Value
- Standard
- Lapsing
- Deeply Lapsed
- Other constituents

Testing?

Application of past learnings – what's worked that we can replicate  
Appetite to innovate

MULTI CHANNEL

Integration  
Website,  
EDM  
SMS  
Digital paid and organic

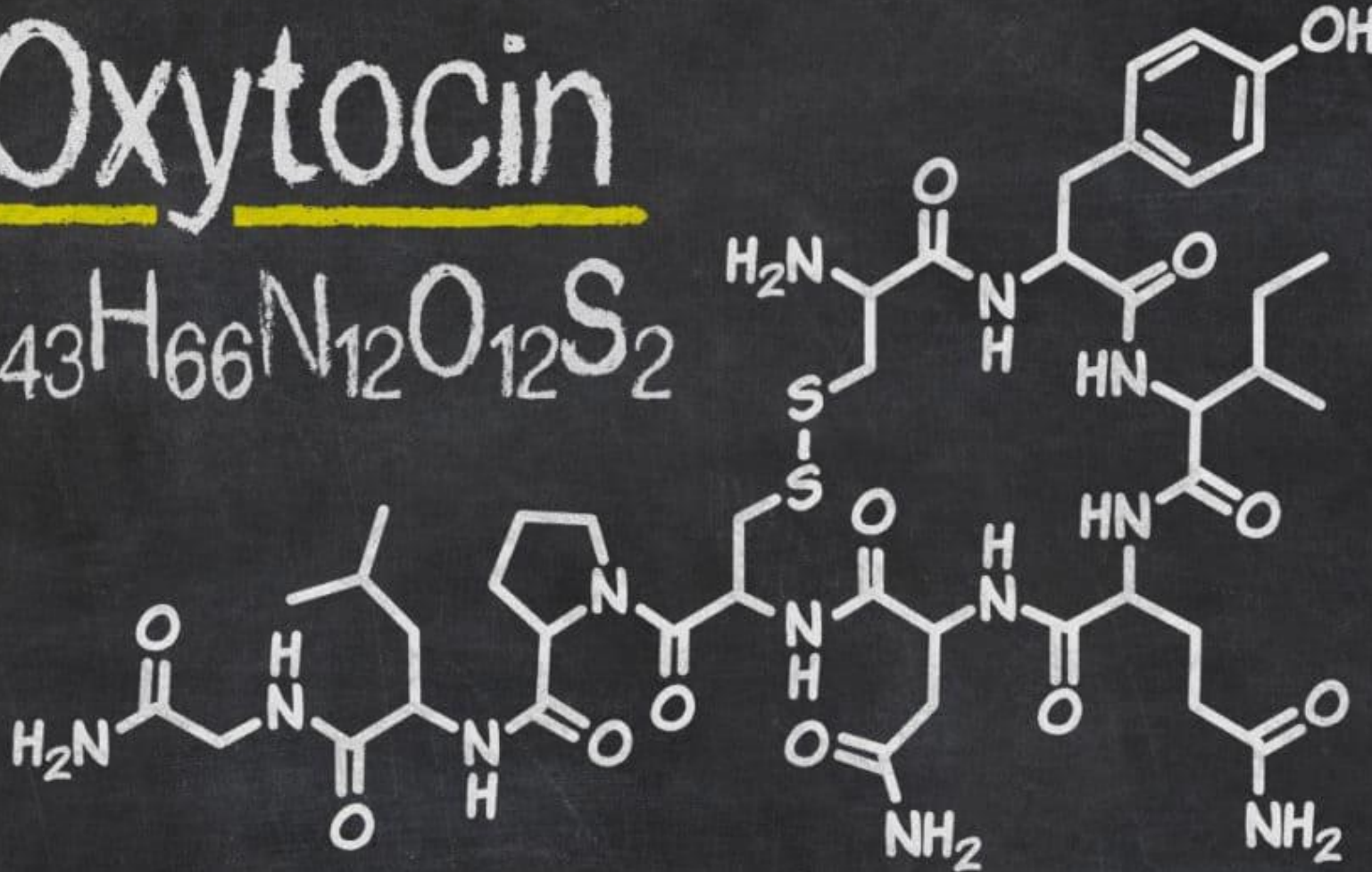
NEXT

Post Campaign Stewardship  
Receipt letter  
Thank you calls  
Update on progress  
Recognition of support in next comms  
Surprise & delight





# Oxytocin



The love hormone.

We are designed to care about others. The reason we are charitable is that we can't help it, we have a built-in brain mechanism that connects us to other people."

Beyond a mere transaction – giving produces happiness and self worth.





# Photo A



OR

# Photo B



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# Photo A



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# Photo B



On average we all have about  
**35,000 decisions** to make each day.

These differ in difficulty and importance.

If you had to consciously process all these decisions  
your brain would crash.

Decisions are based on short-cuts



# SYSTEM 1

Intuition & instinct

95%

Unconscious  
Fast  
Associative  
Automatic pilot

# SYSTEM 2

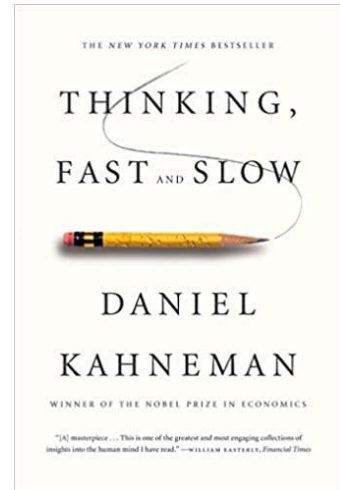
Rational thinking

5%

Takes effort  
Slow  
Logical  
Lazy  
Indecisive



Source: Daniel Kahneman



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# DONORS IN SYSTEM 1 MINDSET

Keep the story singular hero

Present one issue to solve

Use simple, easy to understand language and short sentences.

Use images and captions to explain.

Help skim readers understand the pack at a glance

Use images and content that support the story/problem to solve

Avoid the burden of knowledge – the task is not to 'educate' the donor on everything that you do. The task is to raise fund to solve a problem.

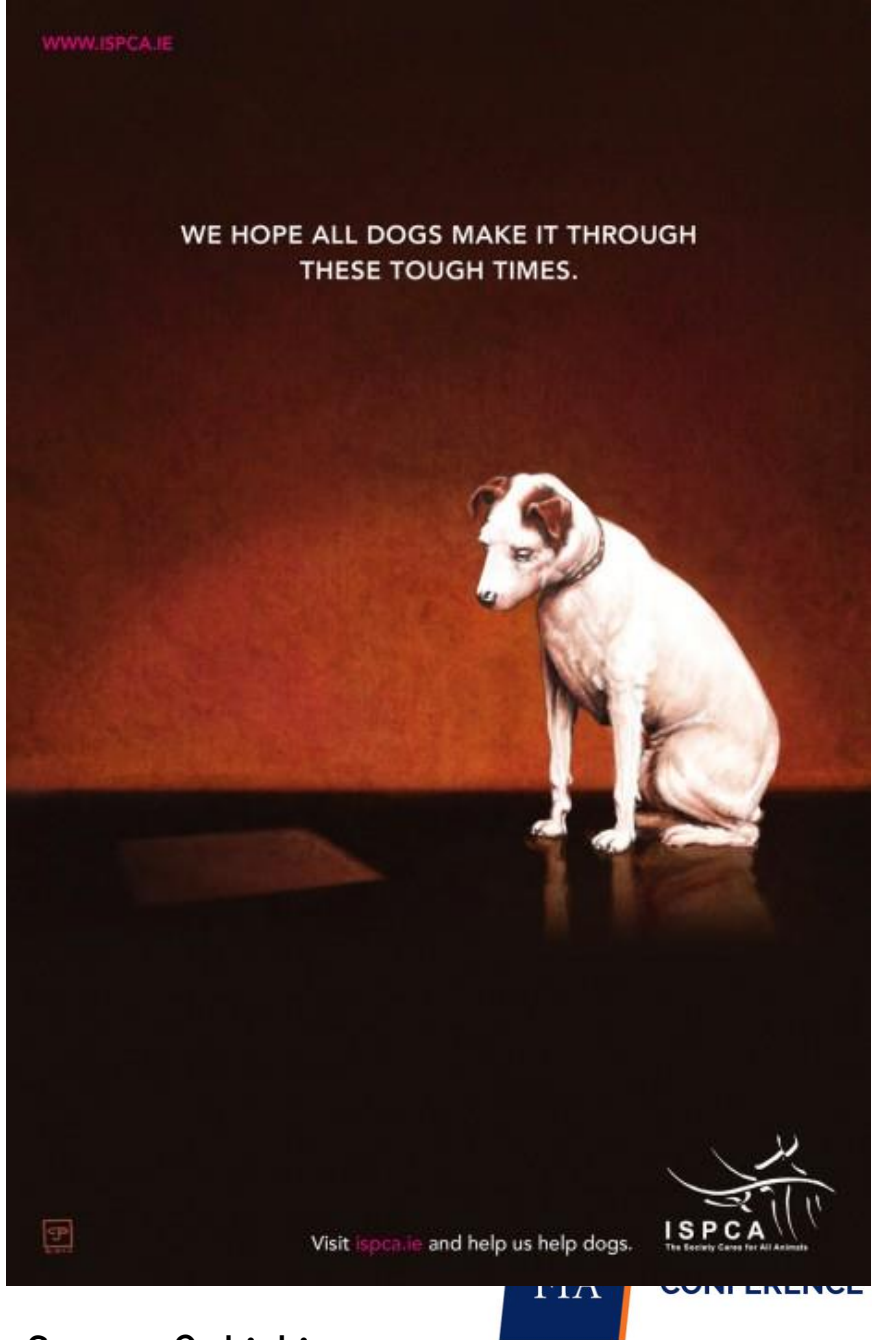
Instead of trying to explain a complicated medical issue – show credibility (introduce authority figures to represent the complex work)



System 1 thinking

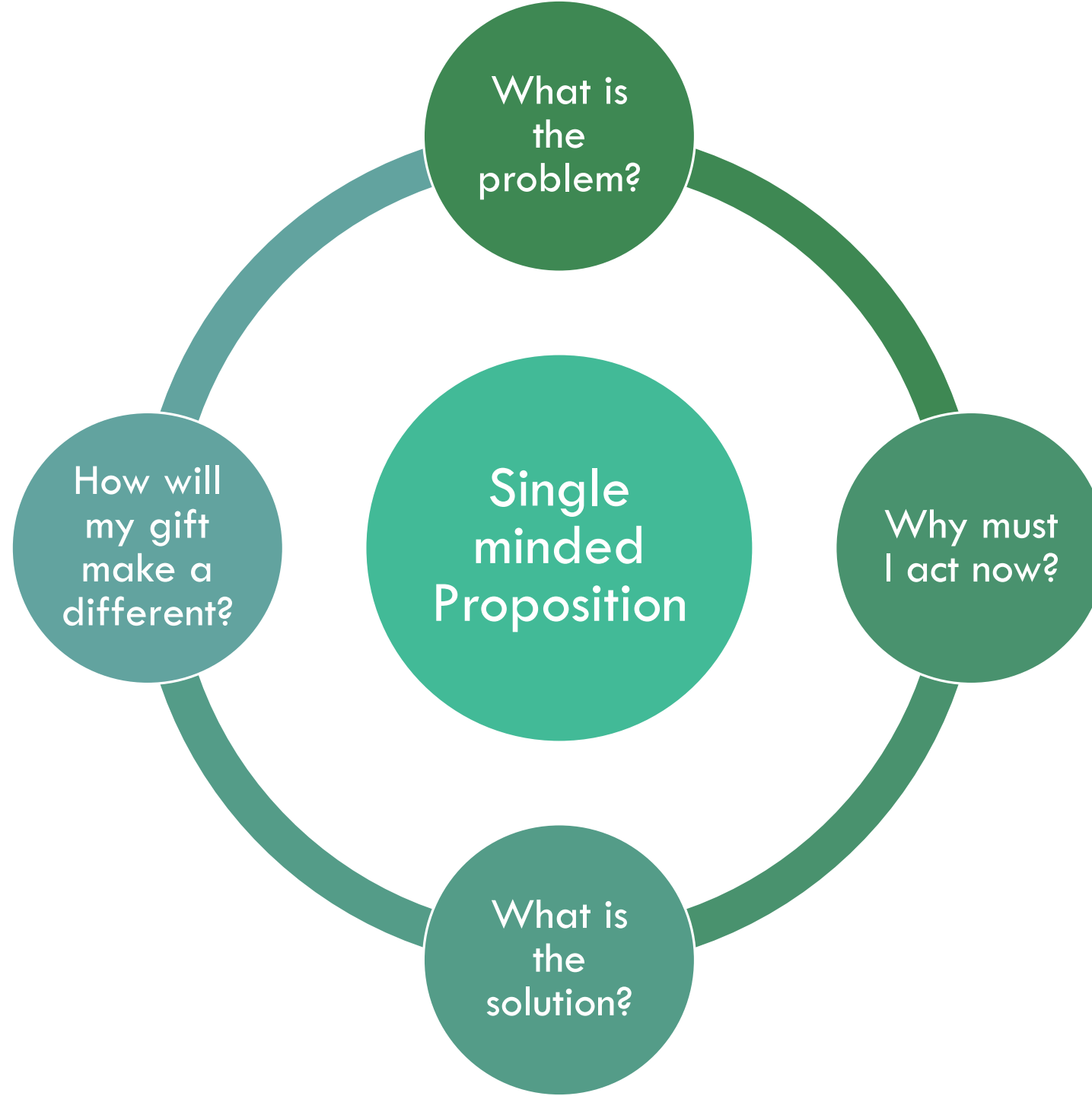
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**VS**



System 2 thinking





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**Find your  
'Because'  
statement**





Because  
everyone  
deserves a  
place to  
call home.



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Because  
our sons  
shouldn't have  
to suffer in  
silence



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Because  
our children  
have the right  
to a live in  
a safer planet



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# Getting your envelope open



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The objective is to **get it open.**

What it is not:

A chance to tell the entire story

Corporate branding

Repurpose past designs

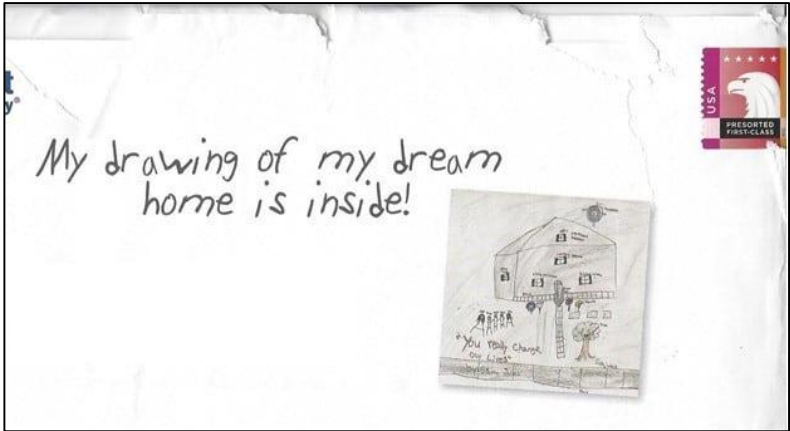
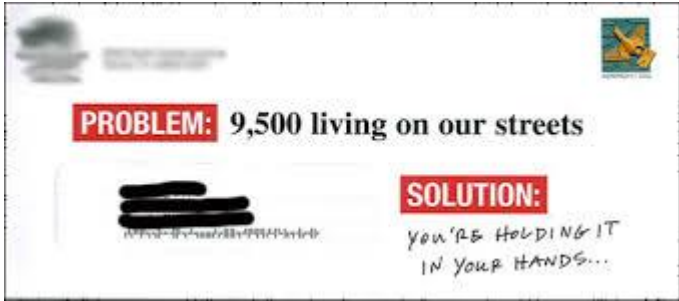
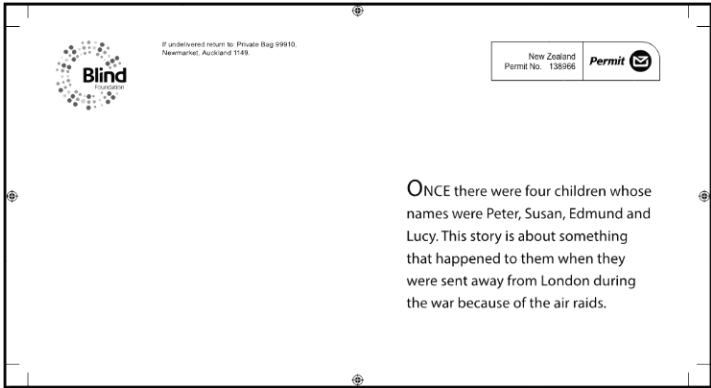
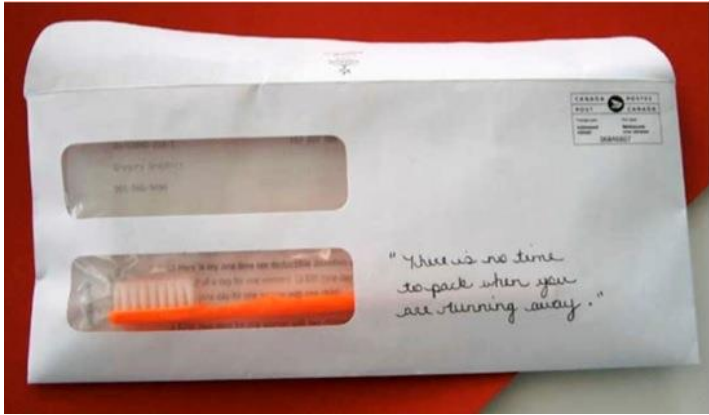
What it ought to be:

Quirky/interesting as I want to know more

Curious to know what inside

A charity I know and trust and always give to

# Test. Test. Test.



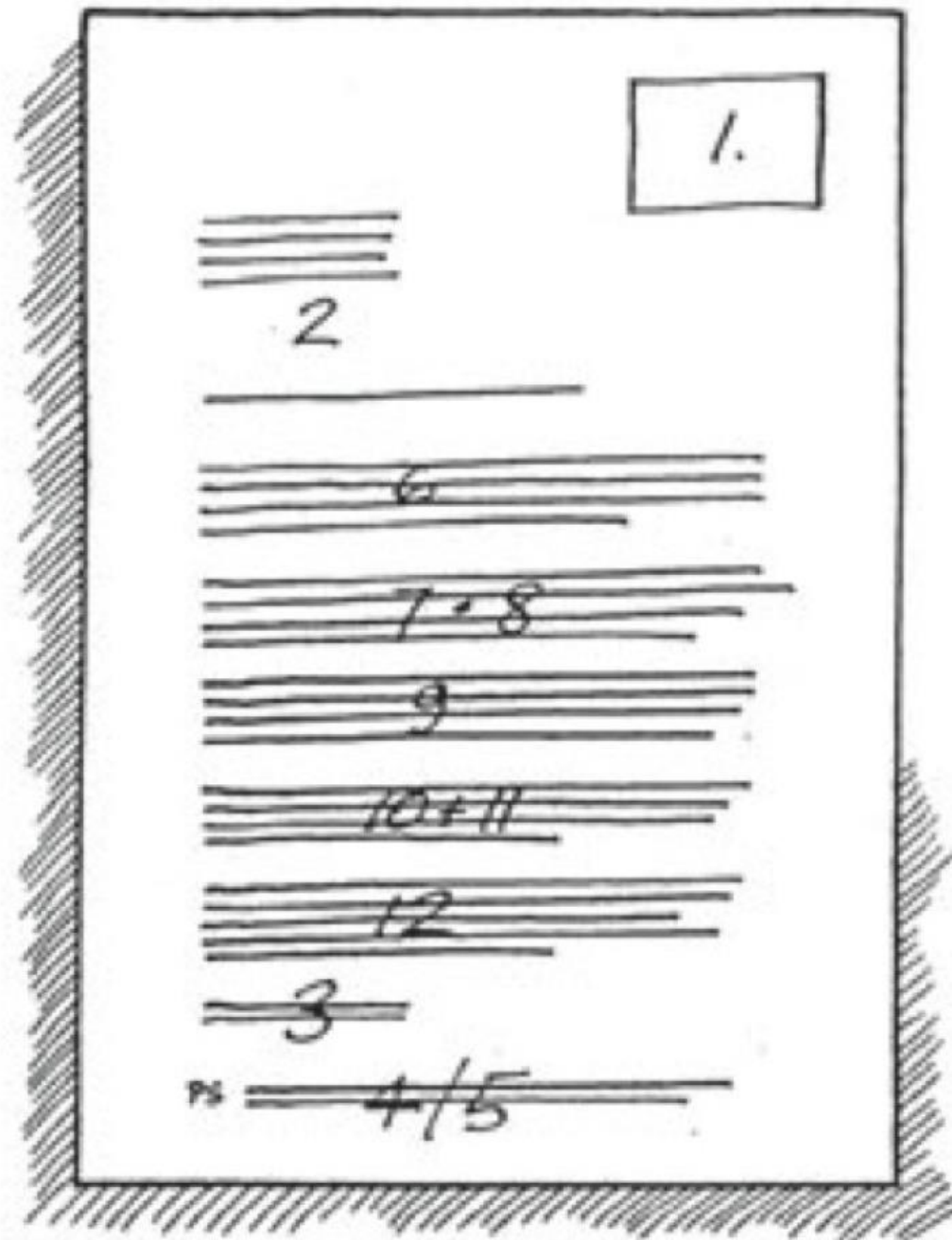
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# Write Your Letter

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A shot taken of me just  
before we left Mexico...  
it's my good side...



Sharon L. Ballou

Ms. Jen Love  
71 Euclid Ave  
Waterloo ON N2L 1Z2

Dear Jen,

June 11, 2010

I bet you've never received a letter from a bird before.

That's OK. I've never written a letter before! Caroline Schultz and the team at Ontario Nature wanted you to hear my story from my point of view.

What a journey it was for me this year!

I just arrived back home here in the spectacular boreal forest in Ontario after my annual 1,000 kilometre migration from Mexico.

Flying across the Gulf of Mexico was different for me this year - did you know there is a massive and foul oil spill? I had a lump in my ruby throat flying over that disaster. Luckily I was able to make a quick stop on one of the offshore oil rigs and clear my lungs out again.

After all, my journey was just beginning.

The northern United States is always treacherous for me. Clouds of pesticide from airplanes are the worst - but by now, I and other hummingbirds have become used to it, and we know to steer clear.

And then, I was elated to fill my lungs with fresh, clean air. I'm home in Ontario! I can smell the boreal forest and wonderful, wild, natural space. What a beautiful province we share!

I'm guided toward the Rouge River, and I'm home free. My heart beats at 1,200 times a minute when I fly. And it skips a

Creative: Agents of Good

# THE BURDEN OF KNOWLEDGE



Capacity Building and planning sustainable futures for low-income communities.

Help families like Maria's recover faster from the cyclone through community meetings where families in the village can come together to discuss and decide what they need immediately as well as plan what they would need for their future to rebuild their lives.





Quality check the data – get the name right.

Pull the reader with a powerful opening statement

Write as you would speak. Keep the language conversational.

Johnson box works – but don't over cook it.

Font type 14. Nothing smaller than 12.

Indents – they hook the reader in.

Underline, bold, bullets, handwriting in margins.

Be bold. Be creative.

Play with the tone of voice

Define the voice of your CEO

Ask with confidence! Its about the impact of your work.

Avoid charity-speak/jargon.

Avoid multiple copywriters.

Avoid puns/humour.

# PERSONALISATION + HYPER PERSONALISATION

Thank you for your kind gift.  
Thank you for your extremely generous gift.

**VS**

Thank you for letting me know in the survey that you are passionate about XXX – because, you'll be glad to hear..

And I'm so grateful you chose to donate \$\$ two years ago for the emergency work in XX.

Thank you for letting us know you changed your address!

You told me in the survey that you are a grandmother - how wonderful. Grand children are such precious gifts.

# Lifts



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Avoid repeating content – have a clear purpose and motivation for each lift

Don't be afraid to explore unique ideas to share the beneficiary story

Do not use the logo and CTA on every lift

Do not restrict yourself to corporate colours - break free!

Brainstorm for alternate options in the absence of photos



I'm not a  
homelessness  
statistic.  
I'm a mum.



It all happened so fast. One day we were a happy family – mum and two precious little girls – the next, everything was falling apart.

My youngest daughter was diagnosed with a brain tumour. She was just two years old, and her diagnosis was serious. Within days, she was having emergency surgery. Then doctors told us we needed to go to Melbourne for eight months of intensive treatment.



I knew it didn't make sense to keep paying rent on our empty house in Hobart while we were in Melbourne – and the medical expenses were going to add up. So, I decided to give up our house.

Eight months later, my daughter was given the all clear. I can't tell you how relieved I was!

But my joy didn't last long, because when we returned to Hobart I quickly realised that finding a new home was going to be nearly impossible. Every rental property was either too expensive, or there were hundreds of other families applying.



# Response Mech

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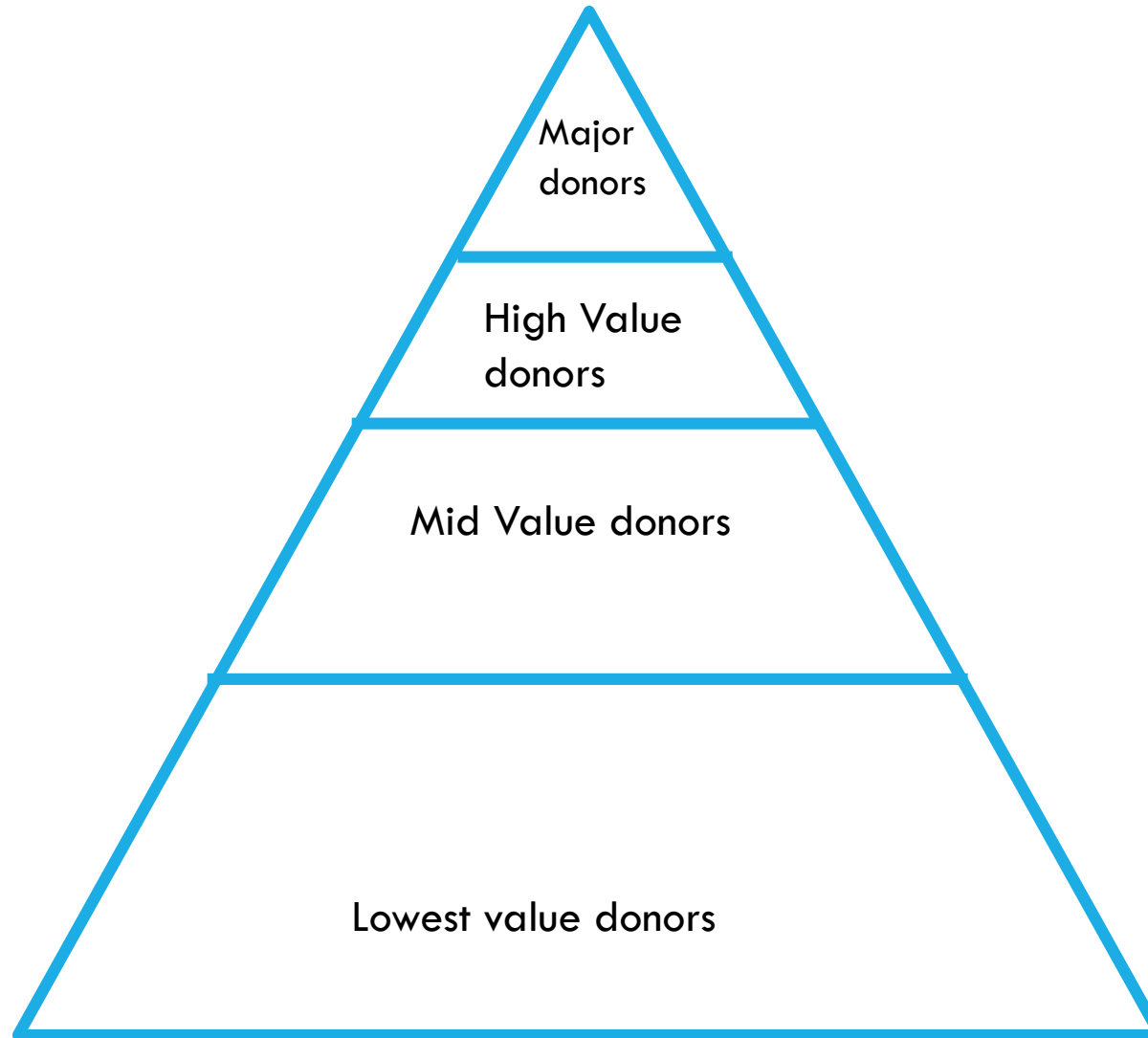
## CHECK LIST

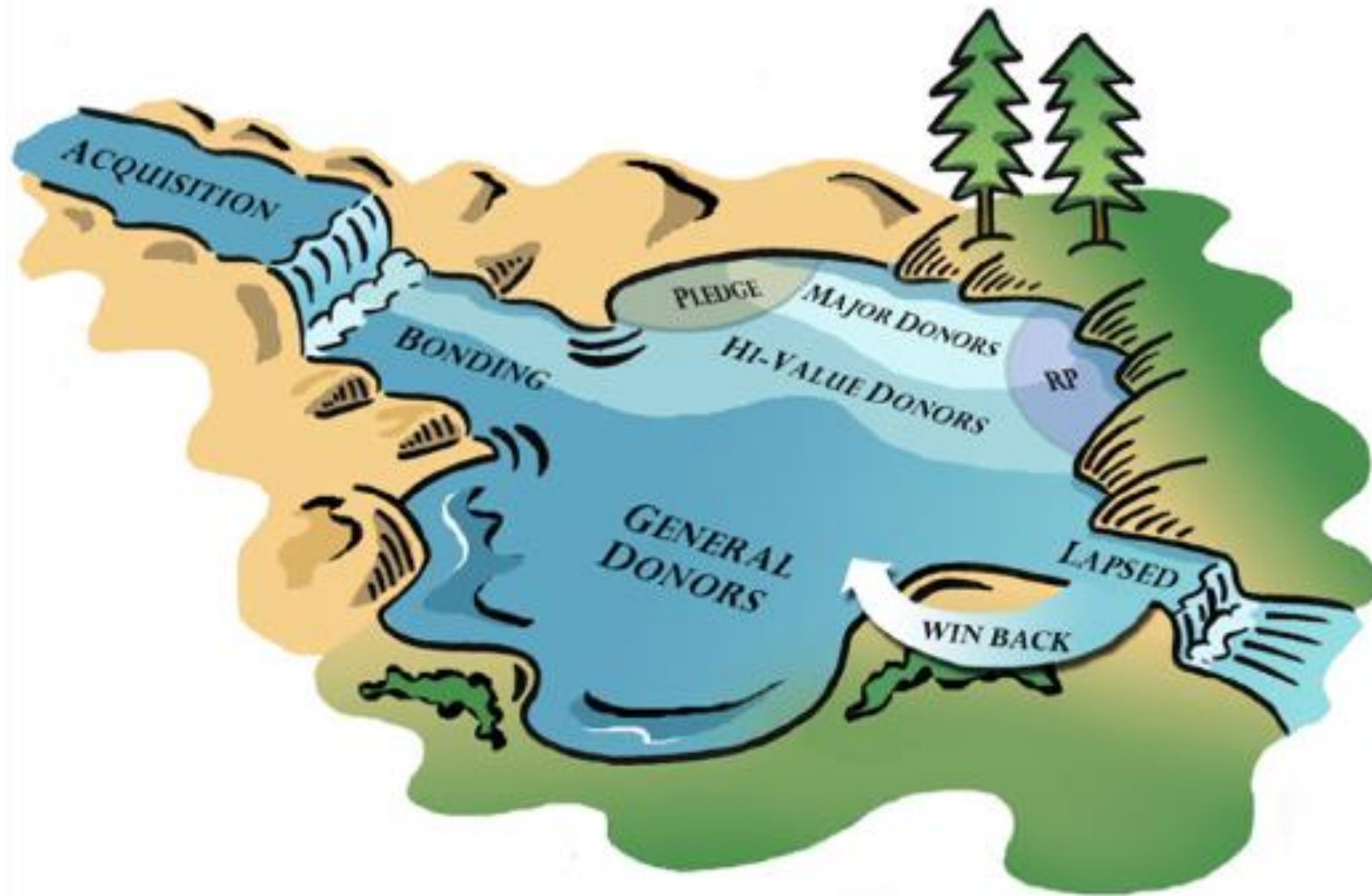
- Ask strategy
- System 1 design
- QR codes
- Donor details are correct?
- CTA is correct
- What's on the reverse?
- Data privacy
- Mid value donor ask
- Dollar match
- Tick boxes

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*Created years ago at the Domain Group by Mark Oehlschlaeger*



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# EDM

Explore the storytelling with EDM journey – think of this as additional touchpoints to the DM comms

PURLS for better response.

A landing page with a CTA that matches your campaign.

Test EDMs – and keep testing.



## SMS

15 cents can go a long way for final asks,  
reporting back with video messages and  
updates.

# DIGITAL

Organic Posts – warm up and post campaign comms

Paid campaign – what ads sets are performing/what audiences deliver the best results

Video

Social moderation

Keep an eye on your CPA/ROI

# Creating a culture of appreciation

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# Before

Date

«addressee»  
«street»  
«city», «state» «zipcode»

Dear «formalsalu»,

(1) Thank you so much for your gift of \$«trecptamt» in support of the Ontario Science Centre.

(2) Science and technology enriches our lives, and a single visit to the Science Centre can plant a seed and provide the tools for a lifetime of exploration and discovery. Thanks to your support, young people and their families from Toronto's at risk communities will experience the inspiration and excitement that you and your family enjoy each time you visit. ← (3)

(4) We're thrilled to announce top-notch exhibitions and IMAX films in honour of our 40<sup>th</sup> anniversary. Come and experience our upcoming features The Science of Spying, followed by Lizards and Snakes, Alive! and our summer food programming. Watch for news on our anniversary celebration in September.

(5) In recognition of your donation, we'd like to acknowledge your support by including your name in our Annual Report and on our Donor Wall. Your donation receipt, in the form of a letter, is enclosed. If you have any questions or need any assistance, please contact Matt Wiesenfeld, Head of Annual Giving at (416) 696-3233.

I hope you visit us soon, to see the impact you are making when you chose to donate to the Science Centre.

Yours sincerely,

Lesley Lewis  
CEO (6)

Encl.

## Lisa Comments:

- 1.) Use an engaging lead. Just like a good fundraising appeal, you want to draw the reader into your thank you. A great way to accomplish this is to start with something other than "thank you" or "on behalf of."
- 2.) Great use of "you" and "your." This is where nonprofits commonly shift into "we-speak" - so by making this "you-based" and focused on benefits (vs. activities), you're on the right track. Well done.
- 3.) Make sense. "At-risk" always makes me wonder, at risk of what? It's best to avoid jargon. And clarify how I help others enjoy the Centre.

(more comments below...)

# After

Date

«addressee»  
«street»  
«city», «state» «zipcode»

Dear «formalsalu»,

(1) Robots whirl. Comets streak. Tide pools gurgle. When science comes to life, anything is possible... and all because of you.

Thank you for your contribution of \$«trecptamt» in support of the Ontario Science Centre! Your gift is already inspiring a generation of future scientists and their families who, without you, might not have the means to visit our Science Centre.

(2) You provide the tools for a lifetime of exploration, too - illuminating the comets, giving tide pools their gurgle, and much more - sharing with others from Toronto's communities the same excitement that you and your family enjoy each time you visit.

(3) In recognition of your kind gift, we'll add your name to our Annual Report and our Donor Wall. (And you'll find your donation receipt enclosed.) If you have any questions, please contact Matt Wiesenfeld at (416) 696-3233. We'd love to hear from you.

Thank you so very much for sowing the seeds of discovery,

Lesley Lewis  
CEO

P.S. (4) There's lots going on for our 40<sup>th</sup> anniversary - from The Science of Spying to Lizards and Snakes, Alive! - so I hope you'll visit us soon. Stay tuned for updates in our upcoming [newsletter?] and at [www.ontariosciencecentre.ca](http://www.ontariosciencecentre.ca). Thanks again.

## Lisa Comments:

- 1.) For inspiration, I looked to your website. The Science Centre has a terrific video online from which I was able to create a new lead paragraph for the letter. (This also "unifies" your theme and language across channels.)
- 2.) Here I aim to show donor how gift is already working. To keep copy donor-centric, I use more "you" than "we."
- 3.) I kept the contacts paragraph... and played down the tax receipt reference. (And online, Recognition Wall is noted, so I left this part.)
- 4.) Also added a P.S. Once you get a "base" thank you letter down, you can keep the copy fresh for longer by updating postscript. (Although you should be updating thank yous, too - every 6 months should do the trick, or even quarterly.) Note: this P.S. also serves to let donors know when you'll update them next.

## Comments, continued...

- 4.) Great programs and excitement, but we-focused. Note difference between you-based paragraph #2 and this one, so all you need to do here is shift the focus.
- 5.) Is donor informed of this ahead of time? Many don't want that sort of recognition. Also, you can eliminate "in the form of a letter" phrase: If you label receipt clearly, simply tell donor it's enclosed.
- 6.) Bravo for signing w/ CEO! Great that signor comes from highest ranks of your nonprofit.

Thank you calls

Receipt within 24 hours

Report backs in newsletter

Update on the appeal in other touch points

Thank sincerely!

# POST CAMPAIGN REVIEW

End of campaign review at 3 months.

Detailed analysis – key metrics:

- Overall RR, Average Gift, Cost per pack, ROI

- Segment based analysis RR, Avg Gift, CPP ROI

- YOY appeal comparison

- YOY segment comparison

- Ask strategy and increase/decrease in gifts

- Donor response to type of Ask/appeal

- Test results

- Second/third gift rates

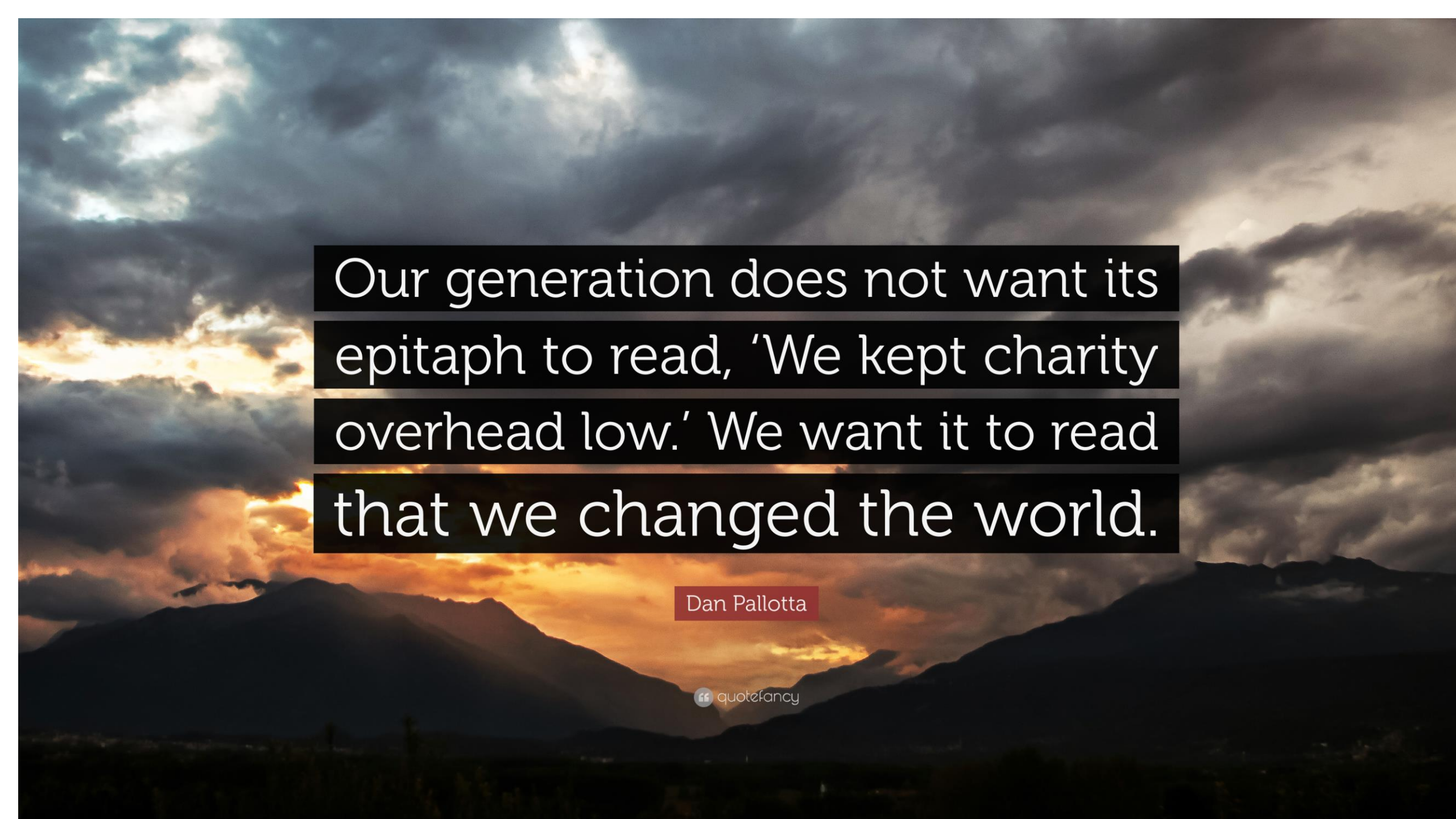
- Retention and Loyalty

- Movement from SV to MV

- Channel of donation – (received DM but gave by phone/online etc)

- Donor feedback



The background of the image is a landscape featuring dark, silhouetted mountains in the foreground and middle ground. The sky is filled with large, textured clouds, some of which are illuminated from below by a low sun, creating a warm, orange and yellow glow. The overall mood is contemplative and powerful.

Our generation does not want its  
epitaph to read, 'We kept charity  
overhead low.' We want it to read  
that we changed the world.

Dan Pallotta





# Thank you

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